



Commonwealth Technology Portfolio Project

Project Manager
Role-Based
ProSight Training



Welcome and Introduction

- Welcome!
- Pat Reynolds, PMD
 - I know what you are going through!
 - Believe it or not, PMD wants your project to be successful.
 - “IT is a means not an end.”
 - “IT Project Management is a means not an end.”
- Why we are here: What you need to know and do as a PM in ProSight.

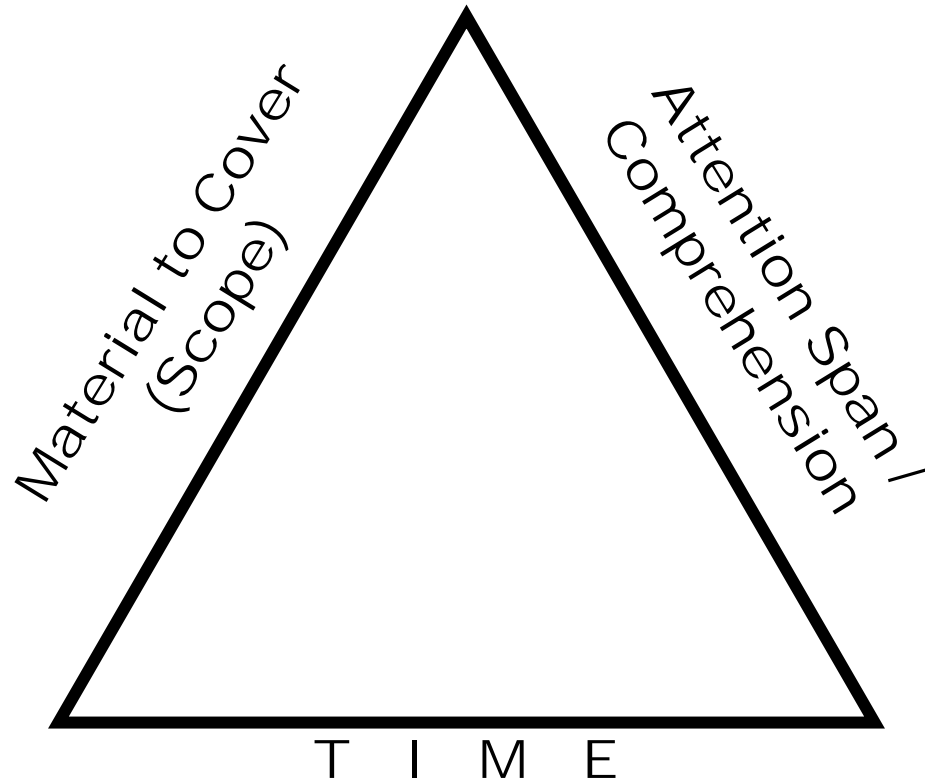


Overall Goals of the Session

- Stay on track.
 - Triple constraints *du jour*
- Lead a guided tour of the PM functions in ProSight.
 - Concept: Same processes using a new tool
 - ProSight has some amazing capabilities – but we are not going there today.
- Equip Agency PMs with what they need to know and do beginning April 1, 2007.
 - K.I.S.S.



Triple Constraints *du jour*





Project Manager Audience

- 1: My project is in the **Initiation** phase
 - Approved for Planning, Project Charter not yet signed, not yet submitted to ITIB for Development Approval
 - Status is currently NOT reported on Status Dashboard
- 2: My project is in the **Planning** phase
 - Project Charter signed, ITIB Development Approval obtained
 - Detailed Project Plan **not yet** approved by PMD/CIO
 - Status is currently reported on Status Dashboard
- 3: My project is in the **Execution & Control** phase
 - Project Charter signed, ITIB Development Approval obtained
 - Detailed Project Plan approved by PMD/CIO
 - Status is currently reported on Status Dashboard
- 4: My project is in the **Closeout** phase
 - Closeout Report not yet submitted to PMD



I am a hot-shot Project Manager; WIIFM?

- Immediately (beginning April 1, 2007)
 - Goodbye CATSPA!
 - Goodbye free-standing Major IT Project Status Report Dashboard
 - Hello common repository for **key** project documents
- Over time (timetable TBD)
 - Common repository for **all** project documents
 - Greatly reduced re-keying of repetitive project information
 - Agency and Commonwealth has a holistic picture of IT projects



Overview: Today we will...

- Demonstrate the PM processes and forms within ProSight
 - From start to finish (from a **Project Manager's perspective**)
- Complete exercises to prepare you for April 1, 2007
 - Find your project
 - Enter minimum amount of data into key fields
 - Create your monthly project status report
 - Upload key project documents
- Explain cutover process
 - What PMs should expect



Overview: Today we will NOT...

- Teach the Commonwealth Project Management Methodology
 - This is taught quarterly (Mandatory Training)
 - You have already attended the CPM lecture (day-long)
- Explain the definition of each field in ProSight
 - Because the definitions are the SAME – they have not changed
 - Plus, there is built-in help available for each field in every form
 - However, we will alert you to peculiar differences between the old Word-based templates and the new ProSight forms.
- Demonstrate **every capability** of ProSight
 - Rather, you will learn just enough to do your job in ProSight



Overview:

Three main topics to cover today



Topic One: Project Manager Processes

- At the end of this training session, the PM will be familiar with:
 - Orientation of PM processes in the ITIM lifecycle
 - ProSight orientation and navigation through the “My Portfolios” navigation pane
 - The integration of the ProSight tool, and the advantages of integration
- Instructor demonstration:
 - Provide ‘guided tour’ of PM Processes within “Role-based Processes”
- No student exercises in this topic.
 - Relax, pay attention, ask questions



Topic Two: Establishing Your Project in ProSight

- At the end of this training session, the PM will be able to:
 - Find the assigned active major project in ProSight
 - Review a minimum number of key fields in preparation for the first cycle of Status Reports
 - Upload a minimum number of key documents for your project
- Instructor demonstration:
 - Demonstrate the class exercise
- Student exercise:
 - Find the assigned active major project in ProSight
 - Review a minimum number of key fields in preparation for the first cycle of Status Reports
 - Upload a minimum number of key documents for your project



Topic Three: Maintaining Your Project in ProSight

- At the end of this training session, the PM will be able to:
 - Submit monthly project metrics into ProSight
 - Understand the change control process in ProSight
- Instructor demonstration:
 - Demonstrate the class exercise
 - Explain Project Sponsor, Secretariat, and CIO approvals
 - Demonstrate Scorecard view of completed project status report
- Student exercise:
 - Find the assigned active major project in ProSight
 - Submit monthly project metrics into ProSight



Overview: ProSight PM Processes

Events leading up to “Approved for Planning”

- **Pre-Select Phase:**
 - (Deliverable: Project IPP-Identified for Preliminary Planning)
- **Select Phase:**
 - (Deliverable: Project APP-Approved for Planning)

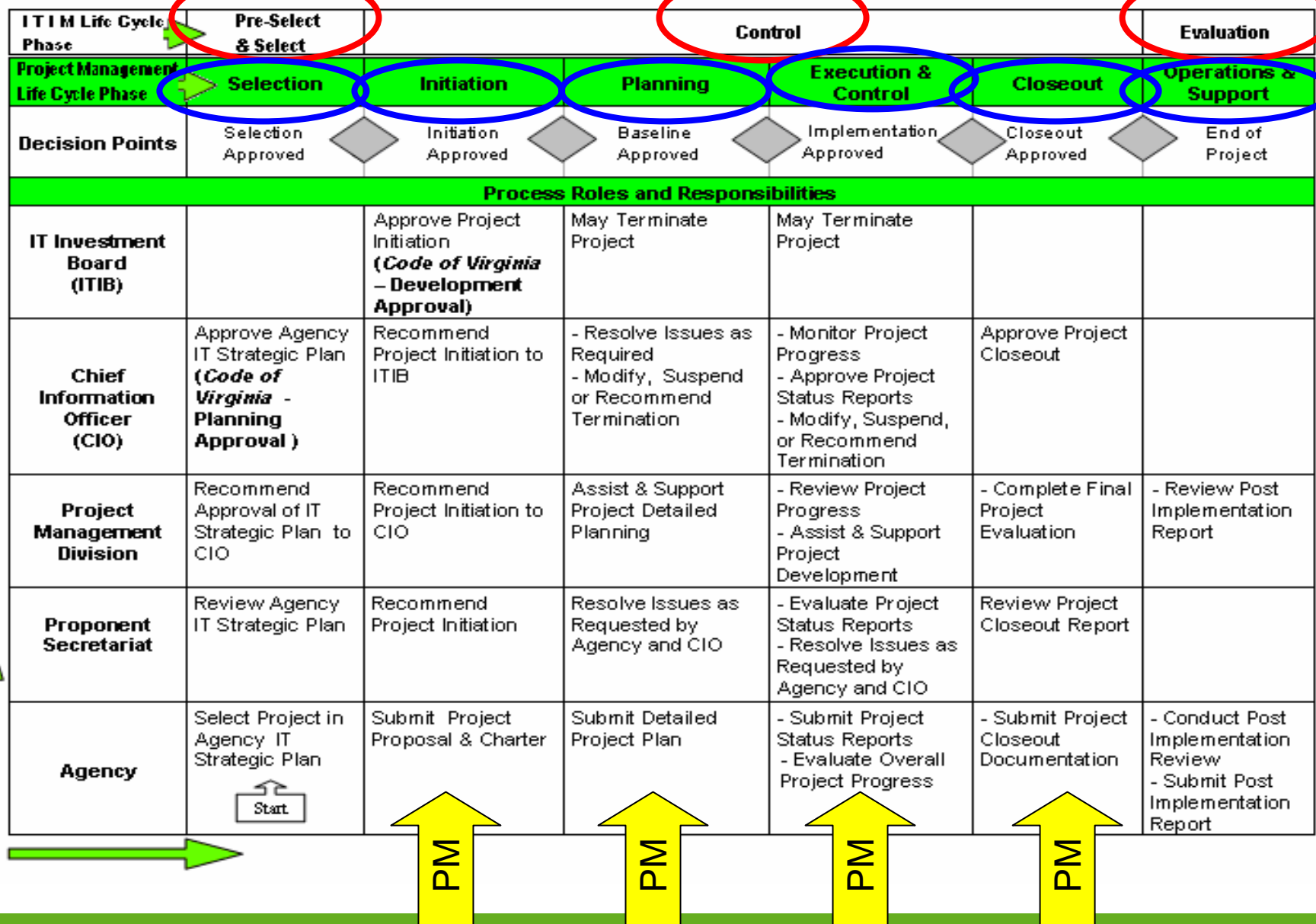
Project Manager Processes in the **Control Phase:**

- (Prerequisite: “Approved for Planning” project)
- **Initiation** Process
 - (Deliverable: ITIB-approved Project Charter)
- **Planning** Process
 - (Deliverable: CIO-approved Detailed Project Plan)
- **Execution & Control** Process
 - (Deliverable: User Acceptance Document completed)
- **Closeout** Process
 - (Deliverable: Project Closeout Report)

We will focus on these areas, because we are focusing on the PM role.

Post-Closeout Procedures

- **Evaluation Phase**, Post-Implementation Review Process:
 - (Deliverable: Post-Implementation Review)





Demonstrate: Initiation Phase

- Ideally, Business Sponsors and/or AITRs complete this phase, but...
- Often PMs are tasked with doing this.
- If your Project Charter is not yet ITIB-approved, *pay special attention!*
 - You will be doing this in ProSight after May 1.
- If your Project Charter is already ITIB-approved,
 - You will upload your signed Project Charter document
 - PMD will pre-load baseline information into ProSight for cutover purposes
 - But still, pay attention – you will see the ProSight system integration throughout the ITIM lifecycle.



Initiation Phase Summary

- Takes the project from...
 - “Approved for Planning” to...
 - “Approved for Development”
- Phase Deliverable:
 - ITIB-Approved Project Charter
 - Supported by Project Proposal, Preliminary Risk Assessment, and Cost Benefit Analysis
- The PM Standard and the documentation have not changed; the method and repository has.



Initiation Phase

- My Portfolios >
 - ITIM Processes >
 - Role-Based Processes >
 - Project Manager Processes:
 - » 1.1. Initiate, Update and Submit – Project Proposal and Project Charter
- Now, just read the “My Portfolios” guide and follow the steps in order!
 - Remember the LIGHTBULB: “Knowledge Base” to give you topical help and form guidance.
- Refer to “**Process 1. Project Initiation Phase**” in your Training Manual.



Demonstrate: Initiation Phase

- Project Analysis Worksheet
 - Optional, but helpful
- Project Proposal
 - Cost Benefit Analysis Tool (upload)
- Preliminary Risk Assessment
 - Dynamic form
- PM Qualification



Demonstrate: Initiation Phase - Continued

- Project Charter
 - New: Measures of Success (previously captured in old Dashboard)
- Project Charter: Development Approval
 - Business Sponsor
 - Agency Head (view only)
 - Form > Export... & save Project Charter as .xml document
 - Attach to email and request approval via email
 - Save approval email reply as .txt, and upload email document into ProSight
 - Notify PMD
 - Secretariat (PMD will coordinate)
 - PMD / CIO / ITIB
 - (Note: If your approval authority uses ProSight, you may use the built-in email function.)
 - ARCHIVE Project Initiation documents!
- Checking Approval Status (Scorecard)
- Project Initiation Transition Checklist



Demonstrate: Planning Phase

- Project Planning requires the most hands-on involvement of Project Managers
- Axiom: The more thought and effort invested in project planning, the fewer unpleasant “surprises” you will encounter during the life of the project.
- If your Project Plan is not yet CIO-approved, *pay special attention!*
 - You will be doing this in ProSight after May 1.
- If your Project Plan is already CIO-approved,
 - You will upload your signed Project Charter document
 - PMD will pre-load baseline information into ProSight for cutover purposes
 - But still, pay attention – you will see the ProSight system integration throughout the ITIM lifecycle.



Planning Phase Summary

- Takes the project from...
 - “Approved for Development” to...
 - CIO-Approved Detailed Project Plan
 - Approved Baseline
- Phase Deliverable:
 - CIO-Approved Detailed Project Plan
 - Plus all supporting project plan documents, as outlined in the Project Complexity Form
- The PM Standard and the documentation have not changed; the method and repository has.



Planning Phase

- My Portfolios >
 - ITIM Processes >
 - Role-Based Processes >
 - Project Manager Processes:
 - » 2.1. Initiate, Update and Submit – Detailed Project Plan
- Now, just read the “My Portfolios” guide and follow the steps in order!
 - Remember the LIGHTBULB: “Knowledge Base” to give you topical help and form guidance.
- Refer to “**Process 2. Project Planning Phase**” in your Training Manual.



Demonstrate: Planning Phase

- Project Complexity Model
 - Determines project documentation needs
- Project Scope and Business Objective Worksheet
- Upload:
 - Work Breakdown Structure
 - Organization Work Breakdown Structure
 - Activity Definition & Sequencing Worksheet
- Resource Plan
- Project Schedule
 - Upload Microsoft Project schedule
 - Enter in Major Milestones

Remember:

Item >

Document... >

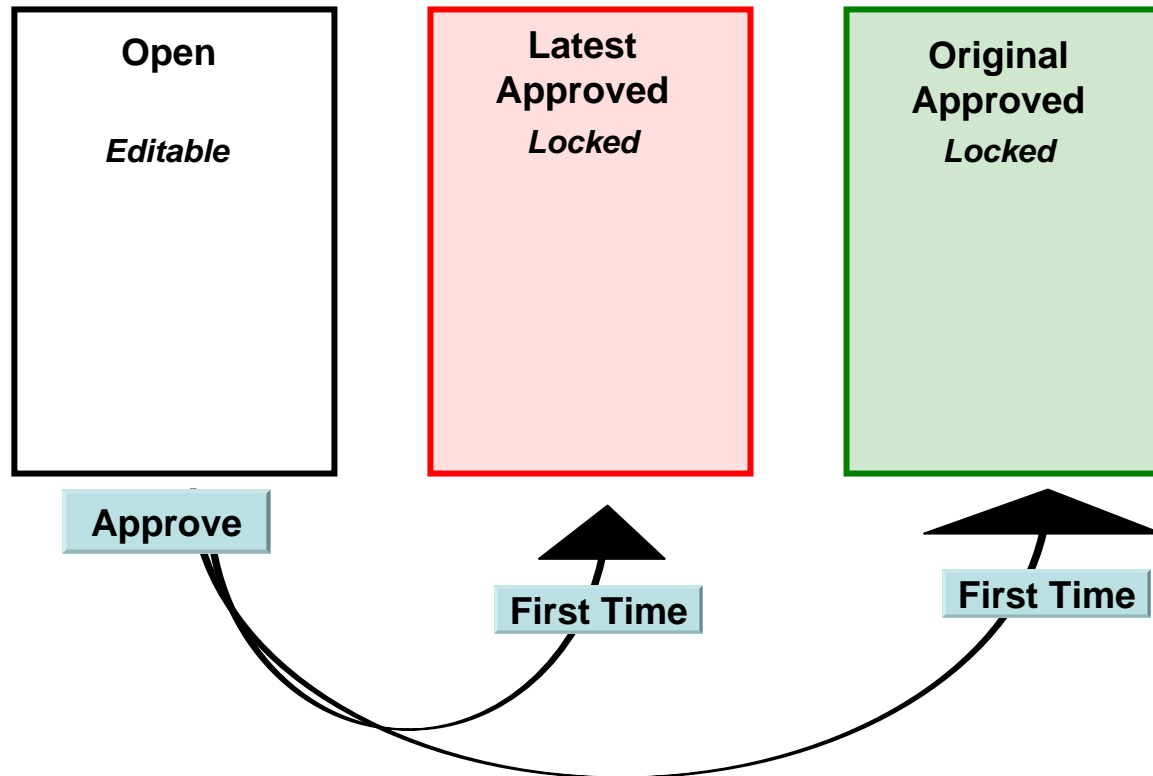
Upload...



ProSight Concept: Baseline Versions

- Original Approved
 - Project Charter Values
 - Cannot be changed
- Latest Approved (or Latest CIO-Approved)
 - Is locked upon CIO approval of detailed project plan
 - Can only be changed by PMD
 - IAOC can add to budget & schedule baseline up to 10%
 - Greater than 10% change requires Secretariat and CIO approval
- Open Version
 - “What if” worksheet; can be changed at will
 - Status Report measures against Last/Latest Approved baseline

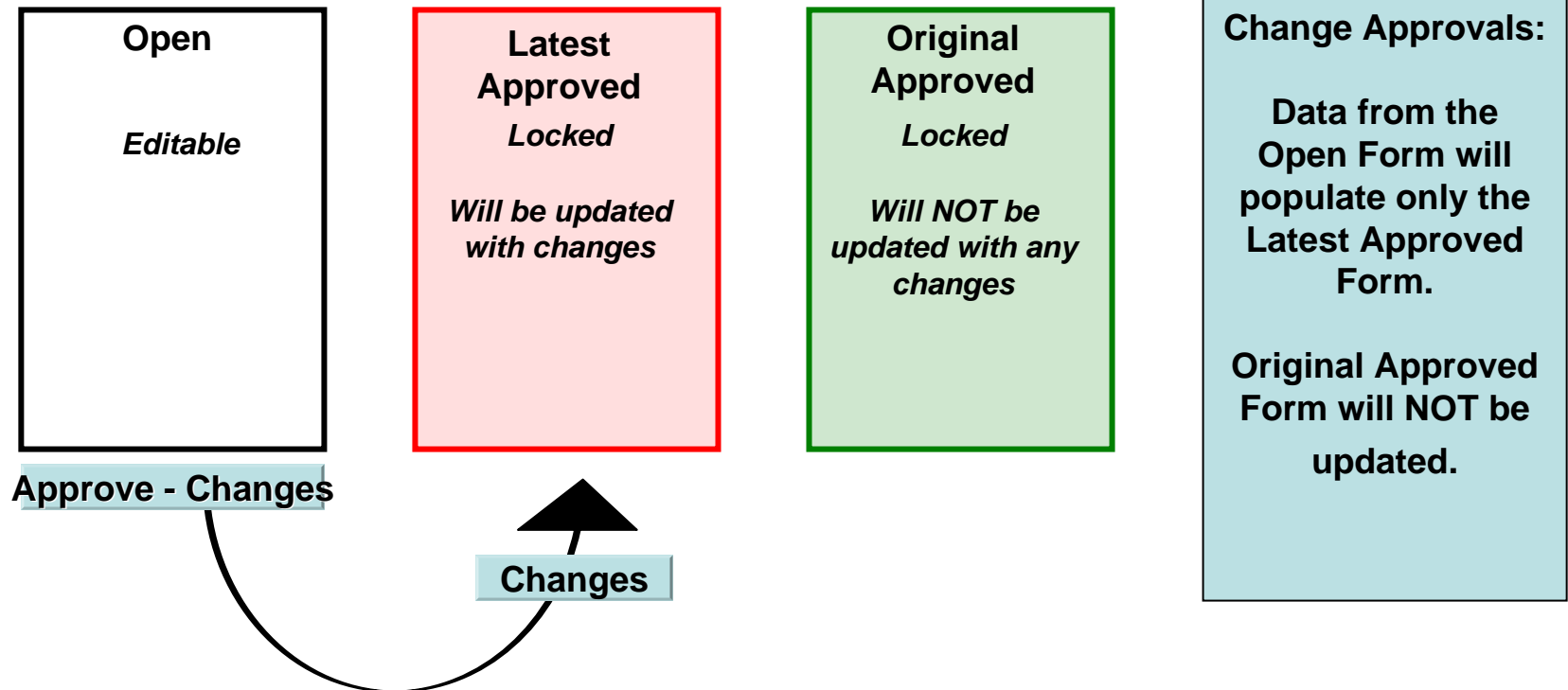
First Time (Original) Baseline



First Time (Original) Baseline:

Data from the Open Form will populate Original Approved Form and Latest Approved Form.

Change Approval





Demonstrate: Planning Phase - Continued

- Risk Management Plan
 - Used to determine contingency cost
- Procurement Plan
 - Recommend using only the “Summary” tab until Procurement Method tabs are further elaborated.
- Communications Plan
 - Useful in detailing communications strategy
- Quality Management and IV&V Plan
 - Remember, every major project requires at least two IV&V's



Demonstrate: Planning Phase - Continued

- Change and Configuration Management Plan
 - (Not Organizational Change Control)
- Performance Plan
 - Measures of Success values will carry forward / backward from Project Charter, Project Plan Summary and Project Status Report
- Budget Plan
 - Quarterly Spend Plan = tactical & 'what if' budgeting
 - Yearly Spend Plan is a good example of the three baseline versions



Demonstrate: Planning Phase - Continued

Project Plan Summary

- Mostly a 'view' of information you entered into ProSight elsewhere – with a few exceptions
- Manually enter: Critical Path Milestones
 - Hint: Run 'Critical Path' report in MS Project & filter Milestones
- Manually enter: Top Ten Risks
- Project Plan Approvals
 - Capture approvals in this tab
 - IAOC (Form > Export... email... upload reply)
 - CIO (PMD)
- Project Planning Transition Checklist



Demonstrate: Execution & Control

- Project Execution & Control is an exciting phase in the project lifecycle.
 - Deliverables are.... Delivered.
 - Progress is measured and reported against the approved project plan.
 - Issues arise and are managed.
 - Risks evolve and are addressed.
 - The project is carefully controlled.
 - This phase also requires plenty of hands-on involvement of Project Managers.
- If your Project Plan is not yet CIO-approved, *pay special attention!*
 - Most of the data – especially baseline information – will be carried over from the Initial Upload, or from the Planning Phase if you complete that phase in ProSight.
 - You will be doing this in ProSight after May 1.
- If your Project Plan is already CIO-approved,
 - You will upload your signed Project Charter document
 - PMD will pre-load baseline information into ProSight for cutover purposes
 - But still, pay attention – you will need to update project metrics every month in ProSight.



Execution & Control Phase Summary

- Takes the project from...
 - CIO-Approved Detailed Project Plan
 - (Approved Baseline) to...
 - Completed User Acceptance Document
- Phase Deliverable:
 - (Besides the new Product or Service...)
 - Completed User Acceptance Document
- The PM Standard and the documentation have not changed; the method and repository has.



Execution & Control Phase

- My Portfolios >
 - ITIM Processes >
 - Role-Based Processes >
 - Project Manager Processes:
 - » 3.1. Initiate, Update and Submit – Project Status Report
 - » 3.2. Initiate, Update and Submit – Issue Management Log
 - » 3.3. Initiate, Update and Submit – \leq 10% Change Control Request
 - » 3.4. Initiate, Update and Submit – $>$ 10% Change Control Request
 - » 3.5. Initiate, Update and Submit – Project Execution and Control Transition Checklist
- Now, just read the “My Portfolios” guide and follow the steps in order!
 - Remember the LIGHTBULB: “Knowledge Base” to give you topical help and form guidance.
- Refer to “**Process 3. Project Execution & Control**” in your Training Manual.



Demonstrate: Project Status Report

- Project Status Report due dates:
 - Project Status forms are prepared at the beginning of each month, based on the previous month's activity.
 - Fifth business day:
 - The PM drafts the monthly version of the form.
 - Eighth business day:
 - The agency sponsor approves the form.
 - Tenth business day:
 - The proponent Secretary evaluates the approved status form.
 - 11th business day:
 - The forms are available to PMD and to the CIO for review and comment.
 - 17th business day:
 - The new Dashboard will take a snapshot of the project status form.



Demonstrate: Project Status Report

- Project Status Report – Step 1:
 - Update Project Plan as necessary; Are there any changed baselines?
 - Review/Update Project Plan Information – ‘Open’ version
 - Project Schedule
 - Adjust Milestone dates as necessary
 - Initiate Change Control Request process as necessary
 - Budget Plan
 - Adjust Budget as necessary
 - Initiate Change Control Request process as necessary
 - Risk Management Plan
 - Update top five risks
 - Performance Plan
 - Adjust Measures of Success as necessary
 - Initiate Change Control Request process as necessary



Demonstrate: Project Status Report

- Project Status Report – Step 2:
Complete the Project Status Report
 - Summary Tab: Key Status Indicators (KSI's)
On Track / Warning / Problem
 - Project Background Tab:
 - Update Approval Information as needed
 - Planned & Actual Costs Tab:
 - Enter Costs to Date
 - Baseline & Milestones Tab:
 - Enter Total (entire project) Percent Complete
 - Enter Milestone Actual Start, Completion & Percent Complete
 - Risk Assessment Tab:
 - Detail the changes, and update the Risk review date
 - Change Control Description Tab:
 - If Latest Approved baselines have changed since the last reporting period, briefly describe the reason and impact.



Demonstrate: Project Status Report

- Project Status Report – Step 3:
 - Submit Project Status Report
 - Approval/Submission fields are on the Project Status Report - Summary Tab (at the bottom of the page)
 - Update approval/submit date field with the latest date.
 - Use ProSight e-mail to request Agency Head approval
 - **Oops!** I messed up: Can I have a do-over?
 - Yes
 - The system saves the latest information on that day
 - However,
 - You cannot back-date project metrics



Demonstrate: Issue Management

- Issue Management in ProSight
 - Used mainly for archiving
 - PMD recommends you use your own spreadsheet for dynamic issue management
 - Upload a dated issue log monthly (use upload tab)
- Issue Management Log (tab)
 - Optional use
 - Enables use of Issue Management Scorecard
- Issue Management Scorecard
 - Optional use
 - Use only if Issue Management Log is maintained



Demonstrate: Change Control \leq 10%

- Cumulative baseline changes that do not exceed 10%
 - Must be approved by the IAOC and
 - Submitted to PMD
- Exactly the same information as today's Change Control Request template
 - Project Manager is the initial Approver (on Review tab)
- Approvals are captured in ProSight form
 - Email or export form to approval party
 - PMD will enter approval information upon receipt
- PMD will key in new scope, schedule & budget baselines.
 - New baselines (Open version) will become "Latest Approved" baselines.
 - Contact your PMD Project Management Analyst for assistance.



Demonstrate: Change Control > 10%

- Cumulative baseline changes that exceed 10%
 - Must be approved by the IAOC and
 - Must be approved by the Secretariat Oversight Committee and
 - Submitted to PMD for recommendation to
 - CIO
- Exactly the same information as today's Change Control Request template
- Approvals are captured in ProSight form
 - Email or export form to approval party
 - PMD will enter approval information upon receipt
- PMD will key in new scope, schedule & budget baselines.
 - New baselines (Open version) will become "Latest Approved" baselines.
 - Contact your PMD Project Management Analyst for assistance.



Demonstrate: Execution & Control Phase – Transition Checklist

- Remember to upload the User Acceptance Report
 - Template link in My Portfolios
- Project Execution and Control Transition Checklist
 - Exactly the same information as today's Project Execution and Control Transition Checklist template
 - Obtaining Business Sponsor approval (tab) is desirable.



Demonstrate: Closeout Phase

- Project Closeout phase also requires hands-on involvement of Project Managers in order to:
 - Administratively close out the project.
 - Handle closeout logistics.
 - Capture lessons learned.
- Though not as 'glamorous' as other phases, it is essential for orderly completion of the project.



Closeout Phase Summary

- Takes the project from...
 - Signed User Acceptance Document to...
 - Completion of the Closeout Transition Checklist
- Phase Deliverables:
 - Project Closeout Report
 - Document Lessons Learned
 - Schedule Post-Implementation Review
 - Project Closeout Transition Checklist
- The PM Standard and the documentation have not changed; the method and repository has.



Closeout Phase

- My Portfolios >
 - ITIM Processes >
 - Role-Based Processes >
 - Project Manager Processes:
 - » 4.1. Updating and Submitting - Project Closeout Report
 - » 4.2. Update Lessons Learned on PMDP Website
 - » 4.3. Archive Project Documentation
 - » 4.4. Complete Project Closeout Transition Checklist
- Now, just read the “My Portfolios” guide and follow the steps in order!
 - Remember the LIGHTBULB: “Knowledge Base” to give you topical help and form guidance.
- Refer to “**Process 4. Project Planning Phase**” in your Training Manual.



Demonstrate: Project Closeout Report

- Documents project deliverables
- Gives final report on baselines vs. actuals
 - Variances and explanations
 - Scope
 - Schedule
 - Budget
 - Operations & Maintenance
- Links to PMD Best Practices & Lessons Learned website
 - Link within ProSight form
- Document Schedule for Post-Implementation Review
- Captures mandatory Sponsor/Oversight/CIO approvals.



Demonstrate: Closeout Lessons Learned & Archive

- “My Portfolios Sub-process 4.2” Lessons Learned
 - Same web page as embedded in the Project Closeout Report form
 - Alternate path to same web page
- “My Portfolios Sub-process 4.3” Archive Project Documentation
 - You should have been archiving documents all along, but...
 - Here is another path to upload documents and view repository of documents
 - Notice you are now in a “Workbook”
 - Use “My Portfolios” to navigate back to other forms as desired



Demonstrate: Project Closeout Transition Checklist

- Project Execution and Control Transition Checklist
 - Exactly the same information as today's Project Execution and Control Transition Checklist template
 - Obtaining Business Sponsor approval (tab) is desirable.



Demonstrate: Evaluation Phase

- PMs normally do not do this phase.
- You *might* be involved in this.
- As always, follow the directions in “My Portfolios”
- Evaluation phase consists of conducting Post-Implementation Review, and uploading results into ProSight.



On April 1, Your Project will be Established in ProSight

- Project Information **Pre-loaded** into ProSight:
 - PMs will verify their current project baselines through:
 - ***Project Baseline Verification Worksheet***
- Starting April 1, find your assigned active major project in ProSight
- You will be able to populate a minimum number of key fields in preparation for the first cycle of Status Reports
 - Explore, experiment – notice how values are integrated across Forms
 - Upload your Project Charter – if it is already ITIB-approved



ProSight Cutover Key Dates - 2007

- March 15
 - Submit your completed Project Baseline Verification Worksheet to your PMD Project Management Analyst
- April 1
 - All active IT Projects will reside in ProSight, with baseline information sufficient to produce monthly status
 - You may begin to review baseline data, populate fields and upload documents (Project Charter if / when you have it)
- May 1
 - Project key document cutoff; beyond this date, project documents will be native-ProSight
 - Begin using ProSight as System of Record depository
- May 8
 - First ProSight – generated status report due from PMs



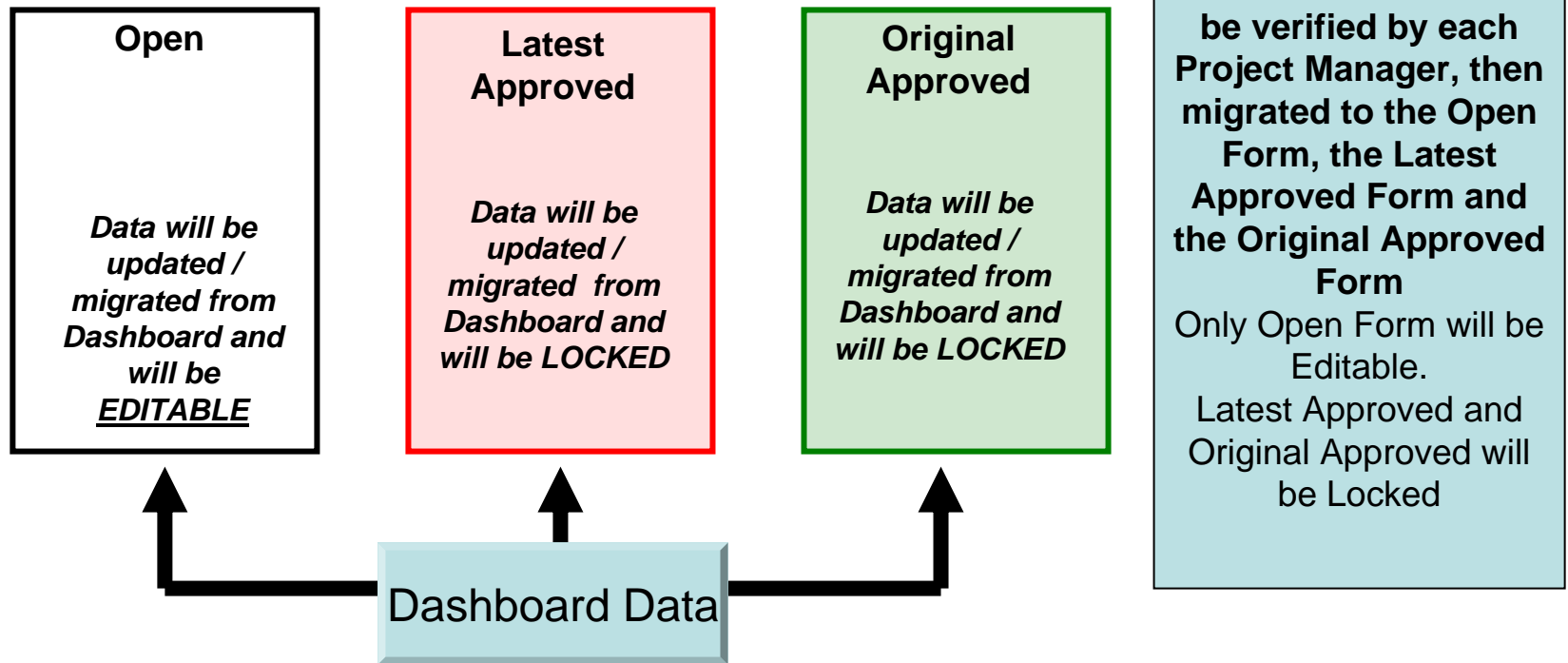
Documentation Cutover 'pseudo-code'

As of **May 1, 2007...**

<i>If your project is in this phase...</i>	<i>and</i>	<i>If you have <u>not</u> completed this key document...</i>
Initiation		Project Charter (ITIB-approved, uploaded to system)
Planning		Project Plan (CIO-approved)
Execution & Control		User Acceptance Report (Sponsor-approved)
Closeout		Closeout Report (Sponsor-approved)

...Then, you must complete these forms and processes in ProSight

Cutover Data Load



(Project Baseline Verification Worksheet)



Hands On: Establishing Your Project in ProSight

- At the end of this training session, the PM will be able to:
 - Find the assigned active major project in ProSight
 - Review a minimum number of key fields in preparation for the first cycle of Status Reports
 - Upload a minimum number of key documents for your project
- Instructor demonstration:
 - Demonstrate the class exercise
- Student exercise:
 - Find the assigned active major project in ProSight
 - Review a minimum number of key fields in preparation for the first cycle of Status Reports
 - Upload a minimum number of key documents for your project



Hands On: Maintaining Your Project in ProSight

- At the end of this training session, the PM will be able to:
 - Submit monthly Project Status Reports in ProSight
 - Store ongoing project documentation in ProSight
 - Understand the change control process in ProSight
- Instructor demonstration:
 - Demonstrate the class exercise
 - Explain Agency Head, Secretariat, and CIO approvals
 - Demonstrate Scorecard view of completed project status report
- Student exercise:
 - Find the assigned active major project in ProSight
 - Submit regular project metrics and documents into ProSight
 - Scorecard: 46a Project Status



PM Processes Exercise

- Review Project Status Report:
 - Summary info and KSIs
 - Measures of Success comments,
 - Planned vs. Actual Costs,
 - Planned vs. Actual Schedule,
 - Risk Management,
 - Submit for Approval
- Maintain Project Issues
 - Regular Issue matrix upload



Summary: Here's what we did Today

- Demonstrate the PM processes and forms within ProSight
 - From start to finish (from a Project Manager's perspective)
- Complete exercises to prepare you for April 1, 2007
 - Find your project
 - Enter minimum amount of data into key fields
 - Create your monthly project status report
 - Upload key project documents
- Explain cutover process
 - What PMs should expect
 - Review cutover handouts



More Information

- My Portfolio – read it!
- LIGHTBULB (Knowledge Base)
- HELP – Generic ProSight help (navigation, etc.)
- Today's Handouts
- Contact your Project Management Analyst
- Online sources – PMD starting a ProSight FAQ
- Peers – let's talk!



PMD Secretariat Liaisons

- Administration, Finance, Technology
 - Chris Hinkle
- Agriculture and Forestry, Natural Resources
 - Mike Sandridge
- Commerce and Trade, Health and Human Resources
 - Hubert Harris
- Education
 - Mike Sandridge (lead) and staff
- Public Safety
 - Bob Haugh
- Transportation
 - Pat Reynolds